

The PPL Web Portal is PPL's online system for participant information, provider information and customer service history. As a key member of the support team for people in Wyoming's Developmental Disabilities Division Consumer Direction Program, you will have view access to most areas of the PPL Web Portal. This document provides instructions for completing basic tasks. Below are the items that this document reviews.

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Registering for a Username

In order to register you must do the following:

Email pplwy@pcgus.com with the subject line "username request."

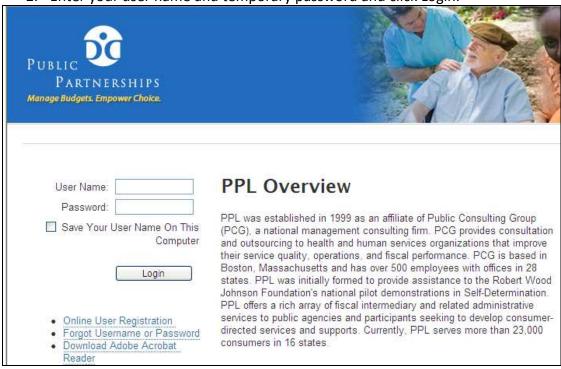
Include in the email the following information:

- Your full name
- Your phone number
- Your email address

Also include the full name, Medicaid ID, and DOB for each participant for whom you provide case management services. You will receive a response with your username and temporary password within one business day.

 Once you receive that email, go to: https://fms.publicpartnerships.com/PPLPortal/login.aspx.

2. Enter your user name and temporary password and click Login.



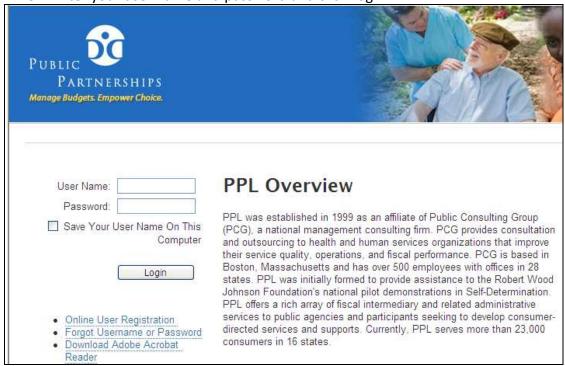
3. The system will then prompt you to create a new password.



Logging In to the PPL Web Portal

The PPL Web Portal only allows case managers who are assigned to participants to access the system. This is to protect the confidentiality of the information kept in the PPL Web Portal. We do not want anyone accessing the PPL Web Portal unless they have reason to.

- 4. Go to https://fms.publicpartnerships.com/PPLPortal/login.aspx
- 5. Enter your user name and password and click Login.



6. The first screen you will see in the PPL Web Portal is the Participant Search screen. Your username will be listed on the upper right hand corner. There are options there for you to log out of the PPL Web Portal, change your password or, if you had rights to see other programs (which you do not), change to other PPL programs.





Looking Up and Reviewing Participant Information

- 1. You can look up participants a variety of ways. Here are some tips:
 - a. You do not have to enter in the entire field. For example, you do not need to enter 'Smith' in last name. You can enter 'Smi' and it will bring up all members with a last name starting with 'Smi'
 - b. You can use the wildcard feature. The * symbol means it will bring up any combination. For example, you can enter 'S*' into the first name field and it will bring up everything starting with 'S'. If you just entered * into the first name field, it would bring up everyone.

Participa	nt Search	20hhau unkeis	adhhau pinkki	
Participant La	ıst Name			
Participant Fi				
Medicaid ID				_
Associated P	rovider ID			
Case Manage	r Last Name			
Search				

- 2. The PPL Web Portal saves several IDs related to participants: There is the Medicaid ID that Medicaid assigns to the participants. There is the PPL ID. This is the chronological ID that PPL assigns to each new participant that is referred to our program
- 3. After selecting the Search button, the PPL Web Portal will display a list of found participants. Please note: the Web Portal will only list the participants assigned to you. You will not be able to see any participants associated with other case managers. If there is someone assigned to you but does not show on the list, please contact PPL.
- 4. The list of found participants includes basic demographic information about the participant, including identification of the name of the individual serving as employer of record. The list also indicates if the participant is Good to Serve. Good to Serve means that PPL has received all of the necessary information from the participant in order for the participant to be ready to receive consumer directed services. This includes all the required demographic information, paperwork and training. So, if the individual is listed as "No" under Good to Serve, you know that some information is missing. A neat feature of the system is that if you hover your mouse above the "No" in the Good to Serve column, the PPL Web Portal will actually list the items that are missing!



Participant	Birth Date	City	Good To Serve*	Employer of Record Name	Case Manager	Phone	Participant Profile
CODY, BUFFALO BILL	07/10/1990	CHEYENNE	Yes	BUFFALO BILL CODY	JACKSON POLLACK	(307) 777-7115	Participant Profile

- 5. Selecting Participant Profile will allow you to review an individual participant's detailed record.
- There are five sections in the first page of the participant's profile: Participant
 Demographic Information, Employer of Record, Responsible Party, Case Manager and
 Support Broker.
 - a. Participant Demographic Information contains basic information about the participant.

Participant Demographic Information—	
PPL ID	C000017
Medicaid No	1234567890
First Name	BUFFALO BILL
Middle Name (optional)	
Last Name	CODY
Gender	М
Date of Birth	07/10/90
Social Security Number	11111111
Address	6101 Yellowstone Road
Address 2 (optional)	Room 186E
City	Cheyenne
State	WY
Zip Code	82002
County (optional)	
Phone	(307) 777-7115
Alt. Phone (optional)	
Email (optional)	buffalobill@yahoo.com
Enrollmont Status	ENDOLLED

b. The Employer of Record section contains information about the individual serving as the employer of record. This may be the participant themselves or, if they have a representative it will be the participant's representative. All participants under 18 have someone else serving as employer of record (EOR).



Employer of Record	
Employer ID Number (EIN)	EMP99-0000009
First Name	BUFFALO BILL
Last Name	CODY
Address	6101 Yellowstone Road
Address 2 (optional)	Room 186E
City	Cheyenne
State	WY
Zip Code	82002
Phone	(307) 777-7115
Alt. Phone (optional)	
Email (optional)	buffalobill@yahoo.com
Social Security Number	111111111
Relationship To Consumer (optional)	

c. The Responsible Party section contains information about an individual who may serve as a contact for the participant. In some instances, the participant serves as the employer of record but would like to record someone else as a contact in case the participant is not available. Sometimes the representative would like to record another contact. This individual does not have an official role in the program; it is just handy to have another place to record contact information.



d. The Case Manager section lists the name of the participant's case manager.





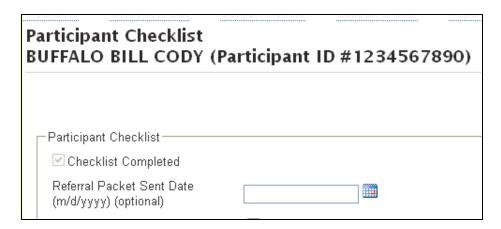
e. The Supports Broker section lists the supports broker assigned to the participant.



2. Select Checklist to go to the list of documentation and training a participant must complete in order to be approved to receive consumer directed services.



3. The top of the Participant Checklist screen shows a checkbox and the wording, 'Checklist Completed'. This box remains unchecked until all of the items required for training and paperwork are completed on the Participant Checklist screen. Once the items are completed, the box will automatically appear checked.

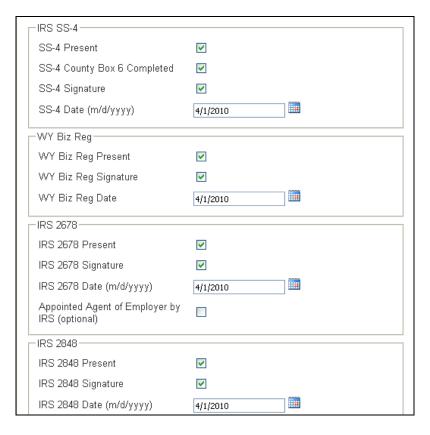


4. The right side of the Participant Checklist may have items listed in red. These are the remaining required checklist items that need to be completed in order for the participant's checklist to be complete.

The following items must be completed:
Checkbox for "SS-4 Present" is not checked



5. The left hand side of the Participant Checklist records the enrollment paperwork required. This information is completed by PPL's Financial Operations Team.



6. The Associated Providers button on the main Participant Profile page takes you to information on the providers employed by the participant.

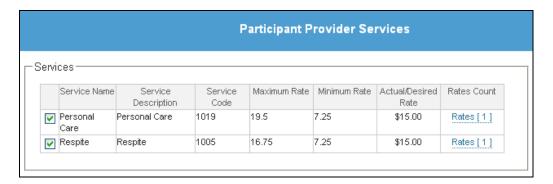


7. PPL Financial Operations staff will associate or disassociate providers to a participant. You can also see if the provider is ready to provide services – Good to Go. If 'Good to Go' is set to no, you can hover over the listing and it will indicate what is missing.





a. By clicking on the Services section in the Associated Providers list, you will see a list of services that the provider is approved to provide as well as the gross rate of pay for the worker. This information will be entered by PPL's Financial Operations staff based on information indicated in the employment paperwork. The minimum and maximum rates have been set by the Division for each service. These rates are unique to self-direction services; services through a traditional provider agency may have different rates.



8. The Service Referrals button on the main Participant Profile page takes you to information on the budgets authorized by the case manager.



9. Service Referrals will bring you to the participant's budget page that will show all self-direction funds that have been approved and entered in by the State.



10. By clicking on the Budget Details hyperlink, will see the breakdown of that particular budget. It will show the total allocated funds, funds spent and budget balance. Also, it lists the authorized services. Should a provider have been paid for providing the authorized services, the total amount paid will appear in the Paid Dollars column. Should a provider have worked authorized services but payroll has not yet been cut, the estimated payment amount will appear in the Invoiced column.



Budget	:		\$	10,000.00)												
Total U	llocated Fur nallocated f udget Balar	unds:		10,000.00 \$0.00 \$9,883.52)	Total Refe Total Spe Total Refe	nt:	Balance:		5	,000.00 \$116.48 ,883.52		art Date: d Date:		6/1/2 6/30/2		
Service	Authorized By	Provider	Start Date	End Date	Units	Unit Increment	Rate	Line Total	Total Units	Paid Units	Remaining Units	Paid Dollars	Invoiced	Balance	Note	Status	Action
1005: Respite	Date		6/1/2010	6/30/2010	N/A	0.25	N/A	\$5,000.00	0.00	0.00	0.00	\$0.00	\$0.00	\$5,000.00		Approved	*
1019: Personal	Date		6/1/2010	6/30/2010	N/A	0.25	N/A	\$5,000.00	0.00	0.00	0.00	\$0.00	\$116.48	\$4,883.52		Timesheet Partially Submitted	₩ Ŀ
Care 🥄																	

11. Clicking on the book icon in the Action column will show detailed information about what has been paid or invoiced.





Reviewing Provider Information

1. To review a provider in the PPL Web Portal, select Associated Provider on the main Participant Profile page.



2. After selecting Associated Providers, you will see a list of the participant's providers.



3. By choosing the Provider ID (blue hyperlink) to the left of the provider's name, you will be brought to the View Provider page.



- 4. There are three sections in the provider's profile: Demographic Information, Services, and Program Checklist.
 - a. Demographic Information contains basic information about the provider. This information is entered by PPL Financial Operations upon receipt of provider paperwork.



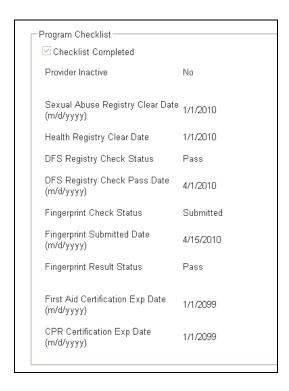
Demographic Information	
Blocked (optional)	No
First Name	Johnny
Middle Name (optional)	
Last Name	Appleseed
Date of Birth (optional)	04/01/50
Social Security Number/TIN	22222222
SSN/TIN verified (optional)	No
Address 1	6101 Yellowstone Road
Address 2 (optional)	Room 186E
City	Cheyenne
State	WY
Zip	82002
County of Residence (optional)	
Phone Number (nnn-nnn-nnnn)	123-456-7890
Alternate Phone Number (nnn-nnn-nnnn) (optional)	
Fax Number (optional)	
Email (optional)	

b. Services information is a checklist completed by PPL Financial Operations staff. It records the services that the provider is approved to provide. Since a provider could work for more than one participant, it is possible that one service could be checked twice with different rates.





c. The Checklist is a list of documentation and training a provider must complete and pass in order to be approved to provide consumer directed services. The top of the Checklist section shows a checkbox and the wording, 'Checklist Completed'. This box remains unchecked until all of the items required for training and paperwork are completed.





Authorizing Services

1. Select "Participant Search" from the main menu.



2. Search for the Participant whose budget you wish to see. You can search using any of the search fields available.



3. After the Participant you were searching for appears, select the "Referrals" hyperlink (in blue) located on the far right hand of the Participant's row.

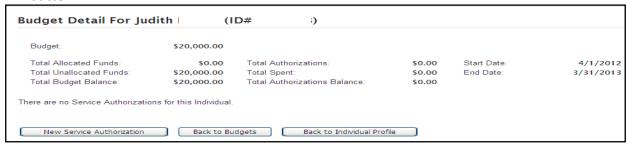


4. You will be taken to the participant's budget page that will show all Plans of Care that have been approved and entered in by the State. You will want to select the "Budget Detail" hyperlink (in blue) that corresponds with the Plan of Care you are working on. This will only be available if the State has entered the approved funds for self-direction for that Plan of Care.

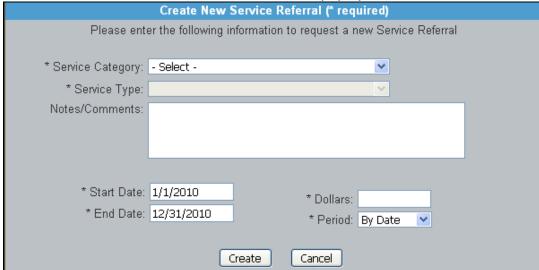




5. You will be brought to the "Budget Details" page. You can now allocate funds to the services specified by the Plan of Care. To do this, select the New Service authorization button.



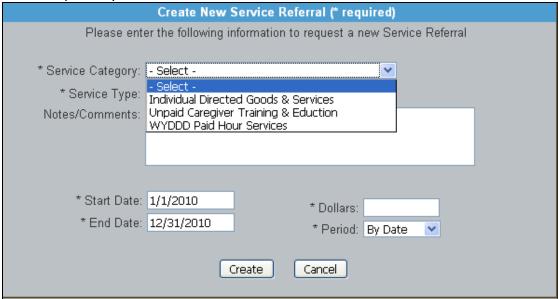
6. A "Create New Service Referral" window will pop up:



- 7. You will select the appropriate services according to the Plan of Care. Services are broken down into three categories:
 - WYDDD Paid Hour Services: All self-directed services except for the requisition services (below).
 - Individual Directed Goods & Services
 - Unpaid Caregiver Training & Education



This means that all of the "WYDDD Paid Hour Services" will use the same "bucket" of funds. The two requisition services will not, as the Division will authorize them separately.



8. After selecting the service category, you will need to select the appropriate service type.

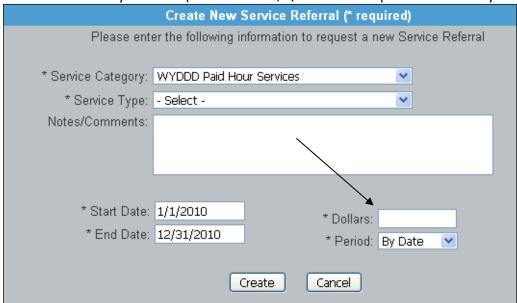


<u>Important Clarification:</u> Do not be alarmed because the system asks you to put a dollar amount in for each service type. This function is required only so that the system understands that an *authorization* exists for a particular service type. When an employee submits a timesheet the system will look to the combination of all service types within a single group in order to pay it.



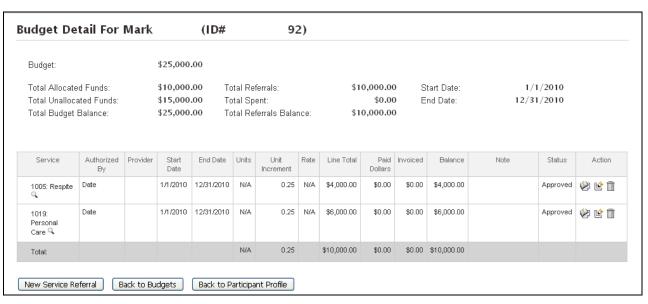
For example: If there is \$10,000 dollars allocated on the Plan of Care for "Respite" and "Personal Care." You will need to put funds in both "Respite" and "Personal Care" in order to create the authorization line for each.

- If you allocate \$4,000 to Respite and \$6,000 to Personal Care and the Participant actually needs to spend \$5,000 on Respite, the system will pull the additional \$1,000 from the Personal Care category without any changes required by you.
- This is because the funds are actually totaled in the back end of the system into one singular group: WYDDD Paid Hour Services
- Requisition services (Directed Goods & Services and Caregiver Training) do <u>not</u> share in this bucket of funds. For these services, each is restricted by the dollar amounts you enter (maximum of \$2,000 for each per Plan of Care year).



- 9. Fill in the dollar amount. **Note: Do not change "Start/End Date" or "Period." They** are dictated by the Plan of Care.
- 10. Then select "Create."
- 11. Go through steps again to allocate for more services.
- 12. When you have finished the "Budget Detail" screen will list the chosen services and the funds allocated to them. **Important:** The service referrals **must** add up to the total budget. If there are unallocated funds left in the budget, the participant will not be able to spend them. See below for an example:





Note: The ACTION column provides a few options:

a. = Display Detail: Details the Service Referral



b. Edit Line: Gives the ability to edit the Service Referral. Be sure to select to save change.



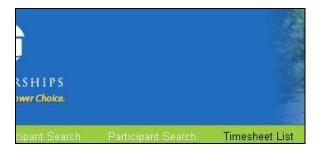
c. = Delete the entire service referral



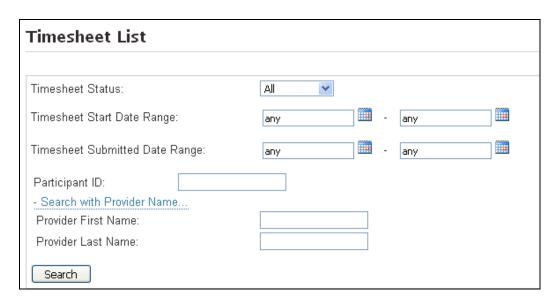
Viewing "Timesheets"

Timesheets for this program are either submitted via PPL Web Portal, fax or mail. The time worked is accumulated and then paid out according to a twice monthly payroll. (Providers are paid for work performed from the 1st to the 15th of the month and then the 16th to the end of the month.) All timesheets data will be saved on the Web Portal.

1. Select Timesheet List from the main menu.



2. Enter look-up criteria into the Search page and select Search.



3. The system will produce a list of "timesheets" that satisfies your query. The list will identify the provider and participant as well as the payroll period for the timesheet. The Web Portal will also identify the status of the timesheet. Unpaid timesheets will be listed with a status of In Process. Paid timesheets will be listed with a status of Paid. Unpaid timesheets identify the timesheet amount. This is the estimated amount based on the information submitted. Paid timesheets list the amount paid to the provider as well as the check number.





4. Click View to see the total daily hours, time in, time out, hours worked and total hours for the pay period. The activities field is an optional place where providers can submit documentation about their shifts.

Date	Total Daily Hours	Time In	Time Out	Hours Worked	Activities
06/16/2010 Wednesday	7 hours	10:00 AM	5:00 PM	7 hours	
06/17/2010 Thursday					
06/18/2010 Friday					
06/19/2010 Saturday					
06/20/2010 Sunday					
06/21/2010 Monday					
06/22/2010 Tuesday					
06/23/2010 Wednesday					
06/24/2010 Thursday					
06/25/2010 Friday					
06/26/2010 Saturday					
06/27/2010 Sunday					
06/28/2010 Monday					
06/29/2010 Tuesday					
06/30/2010 Wednesday					
Total	7 hours				